

Assigning Students to and Removing Students from Cohorts

Purpose

The purpose of this document is to explain how students are placed into and removed from cohorts. Cohorts will be used to identify and maintain a group of students in Banner with one or more common characteristics.

Related Policies and Regulations

1. Campus groups who use cohorts are responsible for maintaining them.
2. **Campus groups must not change cohorts belonging to other groups.**
3. At the time of writing, the following groups will use cohorts in Banner:
 - a. University Honors (Cohort code starts with H)
 - b. Learning Communities (Cohort code starts with L; second letter references college)
 - c. Undergraduate Admissions (Cohort code starts with U)
 - d. HPAC (Cohort code starts with P)
 - e. TRiO (Cohort code starts with T)
 - f. CAMP (Cohort code starts with C)
4. To minimize data entry errors, it is recommended that the mass update process be used whenever possible. Requests for mass updates should be coordinated with Student Affairs Information Systems (SAIS).

Impacted Departments, Units, Programs, and Centers

1. University Honors Department
2. Colleges and Learning Community Staff
3. Undergraduate Admissions
4. HPAC
5. TRiO
6. CAMP

Forms

SGASADD - maintains cohort codes, as well as attributes, which are assigned to the student by effective term.

Procedures

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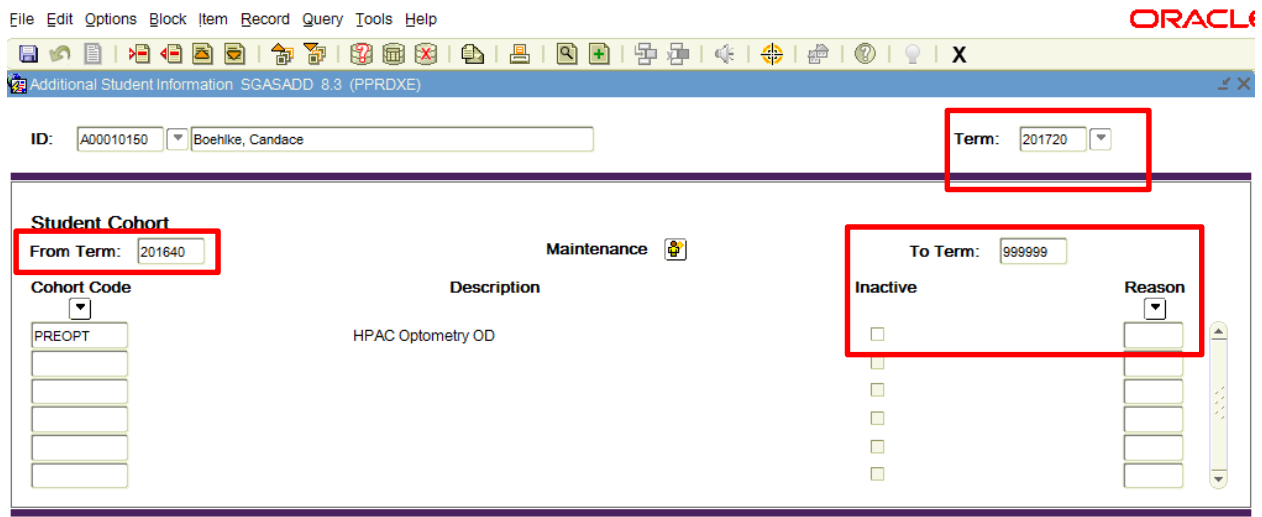
Reading the Cohort Record

Cohorts are viewable by term on the student record. So when you view the form you are seeing what cohorts the student is currently in for that term and potentially what cohorts the student was in at one point. You may want to view several terms to get a full picture of the student's time within a cohort.

1. Go to **SGASADD**.
2. Enter **SID**.
3. Enter the **term** for which you are querying whether the student is in a cohort, next block.

Example 1: View & Interpret Cohorts for Spring 2017; Find the First Term a Cohort Started

The student is actively in PREOPT and has been in PREOPT since at least 201640 (Fall 2016). You know this because the From Term is 201640 and there are no inactive indicators or reasons.



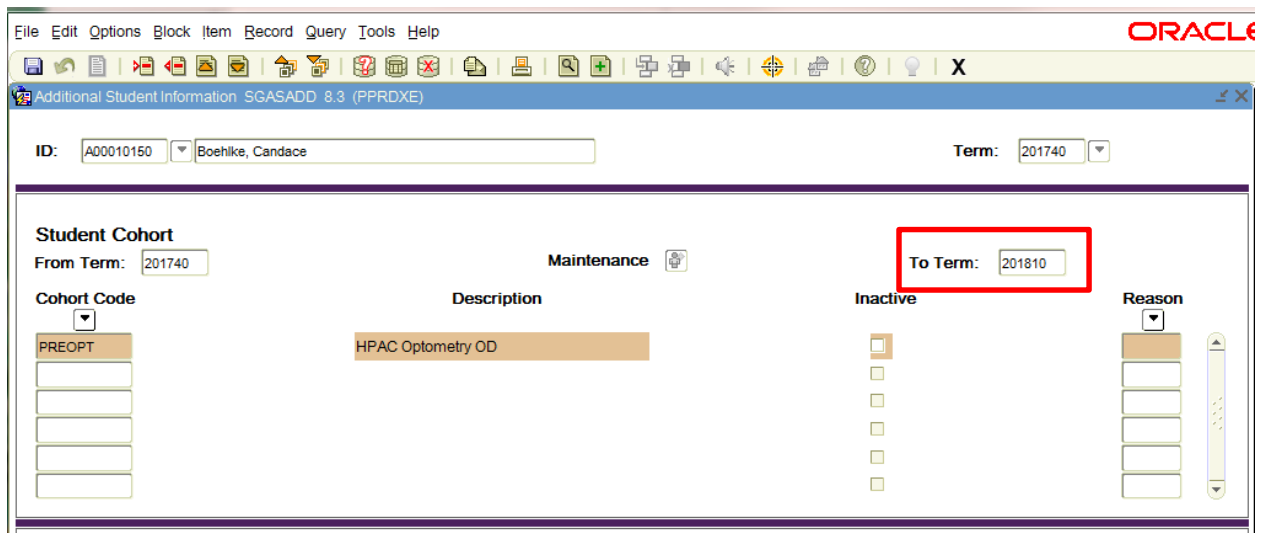
To determine if this is the starting term of the cohort you must determine if prior cohort records exist.

Rollback and enter the term prior to the last known From Term (i.e. 201630). If the PREOPT cohort does not display then Fall 2016 is the first term the student joined the cohort. If it does display, repeat the above step until you do not find an earlier PREOPT record.

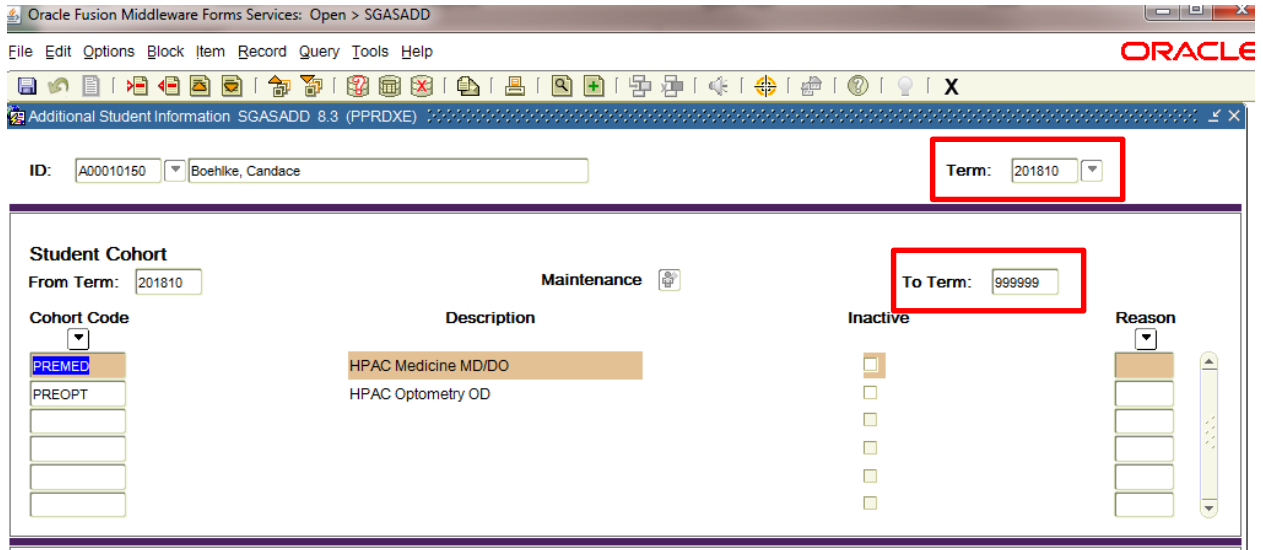
If you find that you more often need to know when students started in a cohort than what cohorts they are part of for a term, it may be beneficial to request a data report that can show you that information in a single snapshot and does not require you to view multiple term based screens in SGASADD.

Example 2: View & Interpret Cohorts for Fall 2017; View Future Terms the Cohort may Exist

The student is actively in PREOPT and has been in PREOPT since at least 201740 (Fall 2017). You know this because the From Term is 201740 and there are no inactive indicators or reasons. Additionally, since the To Term does not equal 999999 (End of Time), you know a subsequent record exists for the student.

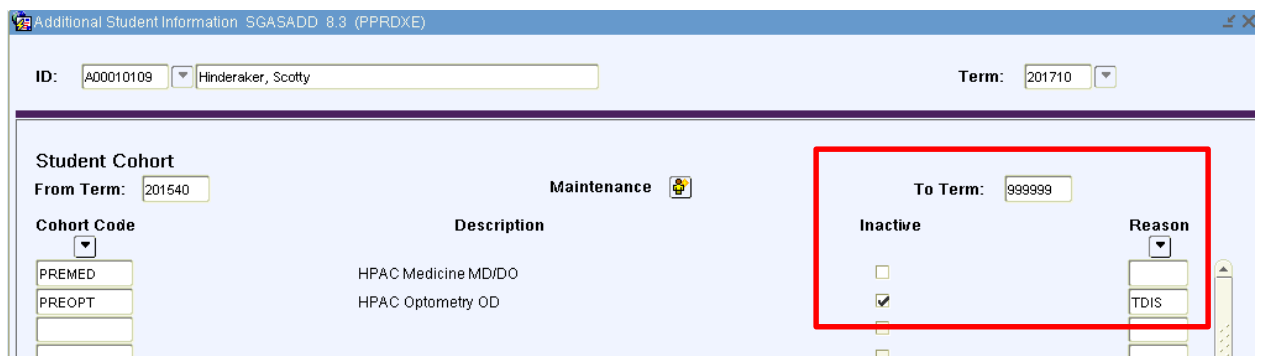


To see the next record, Rollback and enter 201810 in the key block, as seen in the subsequent screen shot. The student is actually in PREOPT and PREMED as of 201810 until 999999 (End of Time).



Example 3: View & Interpret Cohorts for Fall 2016; Active and Inactive Cohorts

Since at least 201540 (Fall 2015) you know that the student is actively in PREMED. You know this because the From Term is 201540 and there are no inactive indicators or reasons. You also know that since at least 201540 the student is NO LONGER ACTIVE in PREOPT since the inactive indicator and reason code are not null.



Maintaining Cohorts in a Term

Cohorts are viewable by term on the student record. Therefore, when you are considering managing cohort(s) on the student's record you want to consider:

1. What term do you need to update?

There are times when a student may start a term in a cohort; however, before completing the term, the student chooses to drop, or is administratively inactivated from the cohort. In these instances, you will inactivate the cohort in that final (single) term. In all other cases, you will inactivate the cohort in the following term.

Example 1: Mary Littlelamb starts the cohort in 201640 (Fall 2016) and is administratively dropped in 201640 (Fall 2016). Inactivation term is 201640 (Fall 2016) and is the term you will update in the steps below.

Example 2: Mary Littlelamb starts the cohort in 201640 (Fall 2016) and completes the cohort as expected in 201720 (Spring 2017). Inactivation term is 201730 (Summer 2017) and is the term you will update in the steps below.

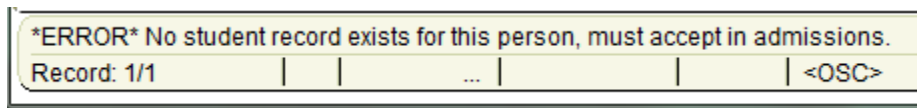
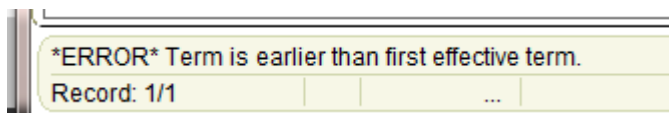
2. Is the student assigned to other cohorts that you should not be updating?

As a reminder, cohorts are updated by departments and you should only be adding or inactivating cohorts that are owned by your department.

3. What action(s) do you need to take? Are you adding; inactivating; or adding and inactivating cohorts?

Knowing what you want to do and in which term (see Question 1 above), prepares you to view the cohorts by term and adjust the student record accordingly.

Note: Cohorts can only be added to students who have a General Student (SGASTDN) record for the term you entered. If you receive an error like the ones below, that is an indication that the student does not have a SGASTDN record.



1. Go to **SGASADD**.
2. Enter **SID**.

3. Enter the **Effective term** for the term you want to update the cohort, next block to the Student Cohort block.
4. Check the **From Term** in the Student Cohort block and select the next step – 4a or 4b

The screenshot shows a form titled "Student Cohort" with a red box around the "From Term" field containing the value "201620". To the right, the "To Term" field contains "201720". A "Maintenance" button with a gear icon is located between the two term fields. Below the form, there are columns for "Cohort Code", "Description", and "Inactive".

- a. If the term **equals** your effective term from step 3, move to step 6

The screenshot shows a student record for "Littlelamb, Mary H." with ID "860775934". The "Term" dropdown is set to "201740". Below this, the "Student Cohort" form has "From Term" set to "201740". The "Cohort Code" is "HON1" and the "Description" is "1st year Honors entrance". The "Maintenance" button is visible. The "Inactive" and "Reason" columns are also present.

- b. If the term **does not equal** your effective term from step 3, you must **Maintenance** the form before you are allowed to make changes.

The screenshot shows the same student record, but the "Term" dropdown is now set to "201820". In the "Student Cohort" form below, the "From Term" is still "201740", and the "Maintenance" button is highlighted with a red box, indicating it must be clicked to update the cohort.

5. Select **Copy** Student Cohort so that all current cohorts are copied forward to your new effective term. For Student Cohorts you will NEVER use the End function within Maintenance. Instead the use of the inactive check box ends the students time in the specified cohort.
6. Your effective term now shows in the From Term and you can update YOUR cohort(s) for this term by
 - a. Adding a new cohort into a **blank row** and/or
 - b. Inactivating a cohort by **checking inactive** and **adding a reason**.
 - c. You may need to do both actions in a single term and that is okay. Do not alter anyone else's cohorts.
7. **Save.**

8. Lastly, before closing out the form, check the **To Term** and select your next step – 8a or 8b
 - a. If it says **999999**, the End of Time, you are done and can close out of the form.

Student Cohort
 From Term: 201740
 Cohort Code: HON1
 Description: 1st year Honors entrance
 Maintenance
 Inactive
 Reason
To Term: 999999

- b. If it says **any other term**, you will have to decide if you need to add the cohort to the other future terms. You may need to do this if there has already been a future maintenance to the cohorts form or if you are going back to a historical term to correct the student record.

Student Cohort
 From Term: 201620
 Cohort Code
 Description
 Maintenance
 Inactive
To Term: 201720

- i. Note the **To Term** you currently see in the form
 1. This will be used in step 3 as your new effective term
 - ii. Rollback to the Keyblock
 - iii. Repeat Steps 3- 8.

Additional Student Information - SGASADD 8.3 (PPROXE)
 ID: 860775934 Littlelamb, Mary H.
Term: 201720

Student Cohort
 From Term: 201720
 Cohort Code: LHRBRSBLUE
 Description: CHASS PRBS Blue
 Maintenance
 Inactive
 Reason
To Term: 999999